Milemarker Integrates Betterment Advisor Solutions for Multi-Custodian RIAs

RIAs on Betterment's custodial platform can now unify accounts, positions, transactions and balances with every other system they run, in one data environment

CHARLESTON, SC, UNITED STATES, September 29, 2026 /EINPresswire.com/ -- Milemarker, the infrastructure platform for wealth management, today announced an integration with Betterment Advisor Solutions, the custodial platform for independent RIAs. Advisory firms that custody client assets at Betterment can now bring that account data into Milemarker's Data Engine, where it is normalized alongside the rest of their technology stack and ready for reporting, analytics and automation.

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>
> *Jud Mackrill, CEO of Milemarker*

The integration is available today to all Milemarker clients.

Most independent RIAs run on several systems of record at once: one or more custodians, a CRM, a portfolio management platform, planning software and billing. Each holds a different slice of the client relationship, so a firm-wide view usually means exporting files, reconciling spreadsheets or maintaining custom data pipelines. For firms that use Betterment Advisor Solutions alongside another custodian, Betterment accounts have often sat apart from the rest of the book.

With the new integration, firms can opt to connect their Betterment Advisor Solutions data to Milemarker. Accounts, positions, transactions and balances arrive over an encrypted SFTP feed and are validated and loaded into a Snowflake environment the firm owns. They are then structured in the same schema as every other source the firm connects, so a Betterment account looks the same to a dashboard, report or workflow as an account held anywhere else.

With Betterment data in Milemarker, advisory firms can:

- See assets, households and accounts across every custodian in one view, Betterment included
- Build dashboards and reports that span the full book of business without separate Betterment exports

- Analyze cash, asset flows and account growth consistently across custodians
- Configure automation workflows that act on Betterment accounts alongside CRM and portfolio data
- Keep ownership of their data in a firm-controlled Snowflake environment

“Milemarker and Betterment share the view that the RIA community deserves better when it comes to data flexibility and access,” said Jud Mackrill, CEO of Milemarker. “We’re proud to help Betterment customers aggregate their data alongside everything else that’s part of their business. In the short time since we went live, it’s been rewarding to watch advisors build out dashboards and workflows they couldn’t run before — analysis and automation that spans their entire book, Betterment accounts included.”

“Our goal is to make data accessible and connect seamlessly to the other tools that advisors on our platform use,” said Alison Considine, Director of Strategy & Operations at Betterment Advisor Solutions. “Betterment is designed to save advisors time and money so they can scale more efficiently, and interoperability with the rest of their tech stack is key to achieving that.”

Milemarker’s Data Engine structures and normalizes data from more than 690 connections, 270 of them built for wealth management and spanning custodians, CRMs, portfolio management platforms and more, into a single, consistent schema. Betterment account data now flows through that same model, making it immediately available for the reporting, analytics and automation workflows advisors have already built on the platform.

Firms that custody with Betterment Advisor Solutions can see what the connection includes on the Milemarker Betterment integration page, or reach the Milemarker team at milemarker.co/contact to get started.

About Milemarker

Milemarker is the infrastructure platform for wealth management. Its Data Engine connects and normalizes more than 690 data connections, 270 of them built for wealth management, into a unified, firm-owned data environment that powers reporting, analytics and operations for RIAs, broker-dealers, TAMPs and aggregators. Milemarker holds a SOC 2 Type II (Security) report and is built on AWS and Snowflake. Headquartered in Charleston, South Carolina. Learn more at milemarker.co.

About Betterment Advisor Solutions

Betterment Advisor Solutions is an all-in-one custodial platform for independent RIAs. We empower advisors to manage their book with flexible, robust portfolio management software, automated back office tools, and comprehensive advisor support. From model management to customizable billing and multi-channel client solutions across cash, investing, and 401(k)s, Betterment Advisor Solutions helps firms streamline operations and scale efficiently without

sacrificing control.

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